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Foreign Crops and MARKETS

VOLUME 57 NUMBER 25

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FOR RELEASE

MONDAY

DECEMBER 20, 1948

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U.S. DEPARTMENT OF AGRICULTURE

Issued by the OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

LATE NEWS

The British bacon ration, already reduced to 2 ounces per week for the period December 19 through January 1, 1949, is to remain at this level for the 4-week period beginning January 2, 1949, according to John Strachey, British Minister of Food. The reason given is that of delays in shipments from supplying countries, principally Canada, which is supplying only 81,000 tons out of a 100,000 tons contracted for in 1948.

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WORLD FLAXSEED PRODUCTION LESS THAN EARLIER EXPECTATIONS

World flaxseed production for 1948 is now estimated at 143.5 million bushels by the Office of Foreign Agricultural Relations as compared with 126.6 million bushels in 1947. The current estimate is 8.2 million less than the September forecast indicated. South American crops are much smaller than expected, especially in Argentina, but the reductions are offset to some extent by gains in the United States, Mexico, and several minor producing countries.

Canada's 1948 flaxseed crop is below earlier expectations and is now estimated at 17.4 million bushels from 1.9 million acres. The reduction of approximately 400,000 bushels was in the Province of Manitoba where 58 percent of this year's harvest was produced. Saskatchewan was the only province that produced less flaxseed than in 1947. The yield of 9.0 bushels per acre was exceptionally good for Canada.

Flaxseed from Western Canada is grading over 90 percent No. 1. C.W. and the average oil content is high. According to a report released by the Board of Grain Commissioners' Research Laboratory, an analysis of average samples representing over 4,000 carlots of seed gave a mean oil content of 42.2 percent compared with 41.6 percent for seed from the 1947 crop.

The Canadian Wheat Board is authorized to purchase all Western flaxseed offered to it, basis Fort William/Port Arthur, at $4.00 per bushel for No. 1 C.W. and eastern seed at the same price, basis No. 1. C.E. in store Montreal, until July 31, 1949.

Mexican flaxseed production of approximately 1.5 million bushels is a record for that country and exceeds the 1947 output by 66 percent. The bulk of the 1948 flaxseed was grown in the Mexicali area chiefly for export. By the end of August, more than 1 million bushels had been shipped.

The United States produced approximately 50 mullion bushels of flaxseed in 1948 (November estimate), only 34,000 bushels less than the record crop of 1943. This country has become the world's largest flaxseed producer, accounting for 35 percent of the total 1948 output. The yield of 11.1 bushels per acre was exceptionally high for the United States. Acreage was 12 percent greater than in 1947 and production 26 percent greater. A goal of 3,026,000 planted acres, to produce 26.7 million bushels of flaxseed, is suggested for 1949. This would be about 36 percent below the actual planted acreage in 1948.

Preliminary estimates of 1948 flaxseed production in European countries indicate an increase of almost 50 percent over the preceding year. The greater outturn is attributed to acreage expansion and favorable growing conditions.

The United Kingdom more than doubled both acreage and production in 1948. The 86,000 acres reported for this country were cultivated for

FLAXSEED: Acreage, yield per acre, and production in specified areas, year of harvest, average 1935-39, annual 1945-48 1/

Continent and country	Harvested acreage					Yield per acre					Production				
	Average 1935-39	1945	1946	1947	1948 2/	Average 1935-39	1945	1946	1947	1948 2/	Average 1935-39	1945	1946	1947	1948 2/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	Bushels	Bushels	Bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
NORTH AMERICA:															
Canada	307	1,059	841	1,571	1,934	4.9	7.2	7.6	7.8	9.0	1,508	7,593	6,403	12,241	17,353
Mexico	16	65	73	78	133	6.9	10.8	10.7	11.6	11.2	111	703	789	902	1,496
United States	1,451	3,785	2,432	4,026	4,514	7.6	9.1	9.3	9.9	11.1	10,991	34,557	22,585	39,763	49,975
Total 3/	1,775	4,909	3,346	5,675	6,581	-	-	-	-	-	12,610	42,853	29,777	52,906	68,824
EUROPE:															
Austria 4/	5	7	5	6	8	7.1	-	8.4	7.6	-	36	-	40	45	-
Belgium 4/	75	60	78	69	74	8.9	9.1	8.0	6.8	7.4	664	548	617	470	551
Bulgaria	4/ 8	5/ 11	5/ 2	5/ 8	-	6.5	5.4	5.5	6.1	-	52	61	10	47	-
Czechoslovakia 4/	6/ 35	7/ 47	7/ 50	50	65	6.9	-	5.6	4.3	6.8	6/ 243	-	277	212	439
Denmark	-	6	3	23	45	-	22.5	15.9	17.5	-	-	145	47	401	
Finland 4/ 8/	9	25	-	25	24	-	4.5	-	8.7	-	-	113	-	-	-
France 4/	92	93	81	81	84	5.0	4.7	4.4	4.3	-	464	433	357	350	-
Germany 4/	6/ 75	-	-	-	-	10.7	-	-	-	-	6/ 795	-	-	-	-
Greece	-	-	-	-	-	-	-	-	-	-	79	-	157	98	98
Hungary	28	5	8	-	-	10.3	9.0	12.3	-	-	283	43	94	-	-
Italy 4/	16	32	33	45	46	12.6	5.3	7.6	9.9	9.6	202	172	252	441	439
Netherlands 4/	42	23	31	33	44	13.0	10.5	10.2	11.7	-	546	245	314	384	-
Poland and Danzig 4/	6/ 158	-	55	100	203	10.0	-	4.1	4.0	-	6/ 1,578	-	367	400	-
Rumania 4/	42	82	50	32	37	6.5	2.9	2.7	-	-	275	234	137	-	-
Sweden	-	38	22	39	49	-	20.0	16.7	16.6	18.2	-	764	360	646	886
United Kingdom	6/ 2	10	11	38	86	-	20.0	9.1	20.0	19.5	-	240	100	760	1,659
Yugoslavia 4/	6/ 33	-	-	-	-	1.6	-	-	-	-	52	-	-	-	-
Total (excl. U.S.S.R.) 3/	650	629	566	684	923	-	-	-	-	-	5,347	4,483	3,822	5,339	7,828
U.S.S.R. (Europe and Asia) 4/	6/ 6,434	-	2,656	3,353	4,730	5.1	-	4.2	4.5	4.6	6/ 32,115	-	11,257	15,230	22,000
ASIA:															
Turkey 4/	48	37	55	70	208	7.3	3.7	5.3	10.0	8.7	349	139	296	707	1,811
India 7/ 9/	3,885	3,465	3,334	3,259	3,338	4.7	4.5	4.4	4.2	4.4	18,096	15,680	14,520	13,120	14,560
Japan 4/	50	95	67	75	-	4.2	4.4	-	-	-	211	420	-	-	-
Total (excl. U.S.S.R. and China) 3/	4,072	3,819	3,678	3,634	3,851	-	-	-	-	-	18,925	16,561	15,415	14,494	17,042

SOUTH AMERICA:															
Argentina	6,077	3,420	3,798	3,339	2,740	9.8	11.1	10.7	9.9	7.7	59,571	37,955	40,706	33,069	21,000
Brazil	-	-	-	-	-	-	-	-	-	-	-	-	866	591	591
Chile 4/	10/ 5	12	13	13	17	8.2	12.5	13.3	13.4	-	10/ 37	151	170	168	-
Uruguay	407	592	300	464	11/ 435	9.6	8.7	9.5	8.8	-	5,894	5,159	2,843	4,087	-
Total 3/	6,569	4,114	4,201	3,886	3,262	-	-	-	-	-	64,033	43,996	44,586	37,916	25,562
AFRICA:															
Egypt 4/	7	7	4	11	22	12.4	10.9	12.0	12.7	14.0	87	77	43	134	312
French Morocco	51	93	32	74	121	7.1	1.4	7.4	5.3	10.1	362	134	238	394	1,228
Total 3/	65	111	87	98	213	-	-	-	-	-	498	242	510	589	1,986
OCEANIA:															
New Zealand	1	10	12	21	13	14.2	12/ 14.3	9.8	6.8	9.2	17	13/ 173	120	144	130
Total 3/	1	10	12	23	20	-	-	-	-	-	17	175	120	170	220
World total (excluding China)	19,566	15,830	14,546	17,353	19,580	-	-	-	-	-	133,545	117,347	105,487	126,644	143,462

1/ Harvests of the Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow; thus the crop harvested in the Northern Hemisphere countries in 1948 is combined with the Southern Hemisphere harvest which began late in 1948 and ends early in 1949. 2/ Preliminary. 3/ Includes estimates for the above countries for which data are not available and for minor producing countries. 4/ Acreage includes area for fiber. 5/ Includes acreage utilized for combined plantings but excludes acreage planted for fiber production only. 6/ Average of less than 5 years. 7/ Sown area. 8/ Flax and hemp through 1945. 9/ Officially reported figures plus Indian official estimates for unreported tracts except in the years 1945-48 inclusive, when no estimates for unreported tracts were available. 10/ 1935 only. 11/ First estimate for planted acreage. 12/ Yield calculated from seed acreage only. 13/ Includes seed from fiber flax.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States Foreign Service officers, results of office research, or other information. Prewar estimates for countries having changed boundaries have been adjusted to conform to present boundaries.

seed only, and production amounted to 1.7 million bushels.

Flaxseed output in the Soviet Union is estimated at 22 million bushels compared with 15.2 million in 1947 and 11.3 million in 1946.

India's 1948 flaxseed crop of 14.6 million bushels was slightly larger than in the 2 previous years but considerably smaller than before the war.

Turkey harvested 1.8 million bushels of flaxseed from 208,000 acres compared with 707,000 bushels and 70,000 acres in 1947. This country has concentrated on flax for seed during the past 2 years. It is anticipated that flaxseed production will continue to expand since farmers in south Turkey, particularly in the Adana area, are finding it a profitable crop. The only apparent check to increased production would be continued high prices for wheat, with which it competes for acreage, but it seems doubtful that current wheat prices can be maintained next year, as they are well above world prices. Exports of flaxseed amounted to 196,000 bushels during January-May 1948 and 298,000 in the calendar year 1947.

Argentina's 1948 flaxseed crop, estimated at 21 million bushels, is the smallest in more than 30 years. Planted acreage was estimated at about 10 percent below that of 1947, but abandoned acreage is now believed to be at least 30 percent. Both drought and frosts did considerable damage to the growing crop.

The area planted to flaxseed in Chile is estimated at 17,000 acres, 30 percent greater than in 1947. If the average yield per acre is comparable to that of the past 2 seasons, production should be well above the 168,000 bushels realized in 1947.

Based on a reduction in planted acreeage, Uruguayan flaxseed production is expected to be somewhat less than the 4.1 million-bushel outturn in 1947. Condition of the crop is reported to be favorable.

There was a substantial expansion in African flaxseed acreage in 1948. Algeria harvested 394,000 bushels of flaxseed from approximately 60,000 acres. Cultivation of this crop was negligible until the French expansion program became effective. The output of seed will be exported to France for crushing. Algeria's domestic requirements of linseed oil were formerly supplied by imports from France.

Egypt's flaxseed output of 312,000 bushels from 22,000 acres was more than double that of 1947.

The extensive campaign sponsored by the Moroccan Flaxseed Pool brought satisfactory results in 1948. More than one million bushels of flaxseed were harvested from 121,000 acres.

(Continued on Page 510)

WORLD BEAN PRODUCTION FOR 1948-49 UP 11 PERCENT

Dry edible bean production in 48 of the world's major producing countries in the 1948-49 season, is estimated at 93 million bags of 100 pounds each. This is 11 percent more than the 83 million bags indicated for these same countries last season, and is also about 11 percent more than in the prewar years 1935-39.

The 93 million-bag figure is based on estimates and reports of crops already harvested in the Northern Hemisphere and on forecasts of crops yet unharvested in the Southern Hemisphere. Excluded from the estimate are many minor producing areas, the U.S.S.R. and certain areas in the Far East, which, in the aggregate would add little to the world totals. Such areas as India, China, and Manchuria are noted more for soybeans, gram 1/ and dry peas than for production of haricot and lima beans, the classes considered in this summary. The U.S.S.R. of course would make considerable difference to the European total figures if data were available to include.

Although the world production of haricot and lima beans is indicated at 11 percent above prewar, the total supply per capita is not above prewar because population has increased about 10 percent. Therefore, in broad terms the world supply in 1948-49 about equals prewar standards. This general statement, however, conceals more than it reveals, because the greatest shortage compared to prewar occurs in the major importing areas and the major increases occurs in the exporting areas. The maldistribution of supplies, accordingly is aggravated. Furthermore, recent trends of international trade in beans do not indicate that the maldistribution will be wholly adjusted by imports and exports in the current year.

The major increases have occurred in North America where production is up about 38 percent, and in South America where it is up about 20 percent above prewar.

The major decrease is in Europe where production is still 12 percent below prewar and Japan where it is 60 percent below. But in Japan, as in most of Asia, haricot beans constitute a minor item in the overall pulse picture. Soybeans are more important. Thus the indicated decline must not be interpreted as a drastic over-all reduction in pulse supplies.

In Europe the picture is quite different. Haricot beans are important there. The current crop is indicated at about 21 million bags in the 16 important producing countries, compared to about 24 million bags in prewar years, and only 16.5 million bags last year. Production was very low last year partly because of a decline in acreage but mostly because of the severe drought in most of the important producing areas.

1/ A pulse similar to chickpeas (Garbanzos).

(Text continued on Page 488; table follows)

BEANS: Dry edible 1/ acreage yield and production in specified countries prewar and 1947 and 1948 2/

Continent and country	Acreage 3/			Yield per acre			Production		
	Average 1935-1939 4/	1947	1948 5/	Average 1935-1939 4/	1947	1948 5/	Average 1935-1939 4/	1947	1948 5/
	1,000 acres	1,000 acres	1,000 acres	Pounds	Pounds	Pounds	1,000 bags	1,000 bags	1,000 bags
NORTH AMERICA:									
Canada	68	97	92	1,131	895	1,076	769	868	990
Costa Rica	44	54	60	518	431	417	228	233	250
El Salvador	52	59	70	823	1,054	1,143	428	610	800
Guatemala	89	65	70	672	742	714	598	482	500
Honduras	60	125	125	467	296	296	280	370	370
Mexico	1,419	1,831	1,947	182	239	265	2,579	4,384	5,153
Nicaragua	40	43	50	375	395	352	150	170	176
Panama	12	15	18	458	400	389	55	60	70
United States 6/	1,700	1,755	1,812	855	976	1,090	14,530	17,133	19,756
Cuba	100	140	160	950	464	625	950	650	1,000
Dominican Republic	100	78	68	515	537	470	515	419	320
Haiti	80	65	65	562	569	569	450	370	370
Total	3,764	4,327	4,537	572	595	656	21,532	25,749	29,755
EUROPE:									
Austria 7/	24	5	6	1,017	1,113	1,018	244	55	60
Belgium 7/	4	2	2	1,000	1,216	1,528	40	25	35
Bulgaria 8/	292	285	245	620	211	490	1,811	600	1,200
Czechoslovakia 8/	54	11	10	1,002	773	970	541	85	97
France	424	390	358	724	345	548	3,069	1,345	1,962
Bizone Germany 9/	4	11	10	1,400	845	1,000	56	93	100
Greece	63	103	98	584	480	578	368	494	567
Hungary	150	250	220	793	773	750	1,190	1,933	1,650
Italy	1,255	1,264	1,220	300	229	335	5,768	2,890	4,090
Netherlands	18	10	9	1,706	1,620	1,378	307	162	124
Poland 8/	95	110	110	919	591	545	873	650	600
Portugal	430	700	700	199	71	129	855	500	900
Rumania 8/	960	410	831	511	791	597	4,907	3,245	4,960
Spain	590	526	500	571	314	309	3,368	1,653	1,543
Sweden 7/	2	1	3	1,821	945	1,494	36	7	48
Yugoslavia 8/	330	450	425	822	611	769	2,714	2,750	3,270
Total	4,695	4,528	4,747	514	364	447	24,147	16,487	21,206

ASIA:									
Iran	385	500	500	312	280	280	1,200	1,400	1,400
Lebanon 7/	2	5	7	1,048	1,472	1,615	22	80	120
Turkey	185	240	222	734	664	857	1,358	1,595	1,902
Japan	450	156	179	747	679	796	3,361	1,060	1,425
Southern Korea 9/	180	95	135	456	379	556	820	360	750
Total	1,202	996	1,043	562	451	537	6,761	4,495	5,597
SOUTH AMERICA:									
Argentina	60	90	100	500	822	800	300	740	800
Bolivia	58	60	62	1,241	1,333	1,371	720	800	850
Brazil	2,350	3,400	3,400	763	644	618	17,932	21,900	21,000
Chile	214	196	180	815	792	850	1,744	1,552	1,530
Columbia	195	200	210	349	380	376	680	760	790
Ecuador	33	35	36	773	814	833	255	285	300
Paraguay	60	70	70	883	857	857	530	600	600
Peru	58	60	62	690	750	758	400	450	470
Uruguay	12	7	8	733	428	938	88	30	75
Venezuela	30	105	105	867	781	781	260	820	820
Total	3,070	4,223	4,233	746	662	643	22,909	27,937	27,235
AFRICA:									
Angola	67	150	171	836	882	851	560	1,323	1,455
Egypt	408	396	413	1,598	1,455	1,533	6,521	5,761	6,330
French Morocco	3	8	15	200	438	693	6	35	104
Madagascar	143	106	110	660	476	511	944	505	562
Union of South Africa	100	135	135	400	496	504	400	670	680
Total	721	795	844	1,169	1,043	1,082	8,431	8,294	9,131
Total specified countries	13,452	14,869	15,404	620	558	603	83,780	82,962	92,924

1/ An effort has been made to include only the haricot and lima bean classes, but small quantities of other classes are undoubtedly included especially in some of the minor producing Latin American countries, also in the Caribbean and the Mediterranean areas. 2/ Years shown refer to the year of harvest in the Northern Hemisphere and to the year of beginning harvest in the Southern Hemisphere. The bulk of the Southern Hemisphere harvest continues into the early months of the year following the year designated in the table. 3/ In countries where beans are grown extensively with other crops the acreage was adjusted to an equivalent basis as if grown alone. 4/ Five-year average used for most of the important producing countries. For a number of minor countries data for less than five years is used and in a few very small countries an estimate was derived. 5/ Preliminary. 6/ Garbanzos excluded. 7/ Acreage figures rounded to nearest whole number, but yield figures are calculated on basis of unrounded estimates of acreage. 8/ Data for 1947 and 1948 covers present boundaries; therefore these data are not strictly comparable with prewar figures. 9/ Data for French zone Germany and U.S.S.R. zones of Germany and Korea not available.

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Considering the 10 percent increase of population in Europe since prewar together with the 12 percent decline of bean production it appears that per capita supplies without imports from outside Europe will be about 20 percent below prewar.

Before the war much of the import supply of western European countries came from eastern Europe, namely the Balkans. Rumania, Yugoslavia and Hungary were among the more important sources. While crops in these areas are indicated to be good this year; and there should be an exportable supply, the quantity, if any, that may be available for export to - western Europe is problematical.

In the light of prewar consumption rates and the very small crop in Europe last year there should be a very substantial demand for imports of beans this winter. Because of the doubtful situation in the Balkans much of that demand should be felt in the Western Hemisphere, but judging from experience last year, any large movement to Western Europe is questionable.

Despite the very small supplies in Europe last year imports of beans from the Americas were held to a minimum. European countries displayed a marked tendency to use their dollar exchange for purchase of supplies other than beans, and pulses generally. This was true not withstanding there were exportable supplies available in the Western Hemisphere. The Europeans chose rather to permit pulse consumption to drop to a low of only 60 percent of prewar levels. In the ECA countries of Europe consumption of pulses in 1947-48 is reported to have been 8.8 pounds per capita compared to an average in prewar of 14.5 pounds. A question arises as to how permanent this rather important and substantial shift of consumption may be. One factor in favor of greater trade this year is the substantially lower price of beans in the United States.

COMMODITY DEVELOPMENTS

LIVESTOCK AND ANIMAL PRODUCTS

WORLD OUTPUT OF DAIRY PRODUCTS, THIRD QUARTER 1948

The production of milk in the July-September quarter, 1948, equalled or exceeded that for the same period a year earlier in all important dairy countries except in Argentina. Nevertheless, the overall output of butter, cheese, and dried milk was less as the prevailing price pattern favored the diversion of milk to the evaporated and condensed product. This pattern predominated in the Northern Hemisphere but is not believed to be carrying over into the Southern Hemisphere as the seasonal upswing in production gets under way.

The higher level of milk output during the third quarter 1948 reflects the better pasture, forage, and feed concentrate supply situation than in the same quarter in 1947. This improvement was particularly noticeable in North America and in western Europe. In the latter area, small increases in the number of milk cows have been reported.

In Australia, with producing conditions becoming more favorable, milk production began an upward trend in August, and output of most dairy products showed the normal seasonal increase in all States in the September quarter. Butterfat production in New Zealand was the highest for the period in years of record, reflecting the mild and favorable winter that permitted dairy cattle to winter well.

Butter production in the third quarter of 1948 fell below that of the corresponding quarter of 1947. Although gains occurred in several countries, decreases in the 2 important producing countries of the Western Hemisphere, namely, Canada and the United States, brought about a decline of approximately 3 percent in overall output. In the United Kingdom, increased milk production was reflected in increased butter production which in the July-September quarter was 10 percent above the same quarter a year earlier. Producing conditions in Eire also were favorable and output of butter there was 7 percent higher than that of the third quarter of 1947. In New Zealand, butter graded for export was above last year's output by 8 percent. The quantity of butter manufactured in Australia showed an increase of 7 percent in this quarter, compared with the same quarter of 1948. Production in Denmark was maintained at approximately the level of a year ago. In Canada, butter production decreased 3 percent in the July-September period, while in the United States, the decrease, the largest for any dairy product manufactured in this country in the third quarter, amounted to 8 percent.

DAIRY PRODUCTS: Output in principal producing and exporting countries, third quarter (calendar) 1948, with comparisons

Country and product	Average 1934-38	Total 1947	1947 3rd quarter	1947 4th quarter	1948 1st quarter	1948 2nd quarter	1948 3rd quarter	3rd quarter 1948/1947
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Butter a/								
Canada	248,119	290,841	112,493	52,368	28,410	93,531	109,488	97
United States	1,673,328 b/	1,331,654 b/	368,367 b/	235,331	246,165	368,275	340,530	92
Belgium	46,179 c/	54,937 c/	16,114 c/	10,498	-	-	-	-
Denmark	400,660	276,637	72,531	58,422	53,572	77,823	72,311	100
Eire	89,400	57,968	26,480	13,289	2,412	18,758	28,382	107
France	d/e/ 444,888	187,195	56,720	33,618	26,808	56,766	-	-
Germany	792,000	-	-	-	-	-	-	-
Netherlands	201,000	115,642	39,851	22,021 b/	18,973 b/	48,356	-	-
Norway	24,930	17,558	5,106	3,028	3,355	-	-	-
Sweden	151,309	209,340	59,398	41,920	41,242 b/	54,813	-	-
Switzerland	62,170	32,628	9,326	7,638	5,933	7,507	-	-
United Kingdom	44,200	15,412	5,152	1,837	1,792 b/	7,437	5,690	110
Argentina	65,742	112,700	19,119	33,457	35,864	24,865	-	-
Union of South Africa	27,725	37,642	6,634	11,389 b/	17,054 b/	11,211	-	-
Australia	f/ 437,032	340,157	65,999	123,746	104,263	58,314	70,932	107
New Zealand - total	g/ 366,049 b/	341,109 b/	54,948 b/	146,138	103,600	-	-	-
Export gradings	h/ 314,753	304,347	43,902	137,453	91,562	22,234	47,633	108
Cheese i/								
Canada	114,699	119,703	56,396	15,525	3,697	30,946	41,675	74
United States	643,234 b/	1,200,266 b/	334,686 b/	203,587 b/	210,385	357,520	313,765	94
Denmark	68,820	126,322	39,902	20,943	16,755	41,226	38,580	97
France	d/e/ 363,098	244,623	72,796	41,140	40,598	87,911	-	-
Italy j/	523,518	-	-	-	-	-	-	-
Netherlands k/	266,549 b/	141,857	49,200 b/	28,122	16,045 b/	68,999	-	-
Norway	39,067	24,259	7,520	2,701	3,886	-	-	-
Sweden	71,269	105,137	29,080	17,362	23,995	36,281	-	-
Switzerland	111,729	85,979	31,415	19,960	12,326	30,432	-	-
United Kingdom k/	109,000	36,916	19,802	2,912	5,690 b/	17,920	23,520	119
Argentina	67,873	194,481	37,123	61,506 b/	61,444	32,773	-	-
Union of South Africa	10,195	17,619	3,690	5,534 b/	6,087 b/	4,215	-	-
Australia	f/ 49,111	96,235	21,614	37,511	21,721	11,467	21,903	101
New Zealand - total	g/ 201,272 b/	205,093 b/	26,992 b/	88,278	61,510	-	-	-
Export gradings	h/ 194,175	195,416	14,796	83,030	64,531	23,108	17,644	119

DAIRY PRODUCTS: Output in principal producing and exporting countries,
third quarter (calendar) 1948, with comparisons

Country and product	Average 1934-38	Total 1947	1947 3rd quarter	1947 4th quarter	1948 1st quarter	1948 2nd quarter	1948 3rd quarter	3rd quarter 1948/1947
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Canned milk								
Canada 1/	92,377	249,312	81,777	46,384	34,945	98,059	105,452	129
United States 1/	2,469,535	4,470,635	1,164,065	725,720	840,425	1,545,388	1,305,170	112
Cuba e/	32,564	31,362	11,963	7,971	4,338	5,326	-	-
Denmark	40,785	38,763	11,534	8,794	9,453	14,131	-	-
France m/	28,953	45,086	14,496	5,922	4,304	17,820	-	-
Netherlands	304,896	79,562	29,455	17,363 b/	9,771 b/	44,143	-	-
Switzerland	14,198 b/	15,330	4,951	2,840	-	-	-	-
United Kingdom	378,560	151,174	30,284	15,322	24,909 b/	91,571	40,410	133
Argentina	-	12,642	3,013	4,610	4,171	2,743	-	-
Australia f/	38,867	124,171	28,023	52,027	36,336	16,329	27,202	97
New Zealand e/	11,273 b/ n/	-	-	-	-	-	-	-
Dried milk o/								
Canada	23,488 b/	69,911 b/	24,542	11,862	7,773	28,840	28,418	116
United States e/	203,555	838,250	215,345	119,125	166,440	294,120	205,605	95
Belgium	5,500	5,509	-	-	-	-	-	-
Denmark	2,205	11,393	3,148	1,570	1,645	4,365	-	-
France m/	7,685 b/	2,621	736	704	864	1,237	-	-
Netherlands	56,438	34,791	16,126	4,560 b/	1,316 b/	24,866	-	-
Sweden	1,351	23,382	6,709	3,790	5,095	7,048	-	-
Switzerland	2,381	5,693	1,476	1,207	-	-	-	-
United Kingdom	33,600	55,372	16,845	13,081	22,669 b/	33,869	15,231	90
Argentina p/	-	17,637	3,357	6,195	5,838	3,163	-	-
Australia f/	16,971 q/ r/	63,465 q/	13,646 q/	24,373 q/	17,048 q/	9,251 q/	14,558	107
New Zealand s/	17,429 b/ n/	-	-	-	-	-	-	-

a/ Creamery butter. b/ Revised. c/ These figures represent controlled production of butter. d/ Total production. e/ Less than a 5-year average. f/ Production year beginning July 1. g/ Production year beginning April 1. h/ Marketing year beginning August 1. i/ Factory cheese. j/ Total cheese, and includes cheese made from the milk of sheep and goats. k/ Includes farm cheese. 1/ Both bulk and case goods. m/ For 1937 only. n/ Canned and dried milk reported at 65,924,000 pounds for 1947. o/ Total dried-whole and dried-skim milk for human consumption. p/ Quantity small. q/ Includes infants' food, health beverages, et cetera. r/ Production of dried-whole and dried-skim milk was 44,256,000 lbs. in 1947. s/ For 1938 only.

Office of Foreign Agricultural Relations. Prepared or estimated from official statistics, United States Foreign Service reports, and other information.

Cheese production dropped 6 percent in the third quarter of this year, compared with the same quarter of 1947. Although increases were registered in some countries, these were more than offset by smaller output in some of the more important producing countries. Among the countries showing an increase in the third quarter was Australia. Production there was at a record level for that quarter of the year, largely accounted for by an appreciable increase in production in Queensland. In New Zealand, cheese graded for export increased 19 percent in this quarter over a year ago. The only other country in which output was higher in the third quarter was the United Kingdom. Production there, although relatively small, was 19 percent over the corresponding quarter of 1947. Output in Canada in this three-month period was down 26 percent, the largest decrease for that country as well as for any commodity. In the United States, cheese production was 6 percent below that of last year. Output in Denmark in the third quarter also was below the 1947 level.

Canned milk production in the quarter under review ran about 3 percent ahead of the same quarter of last year, and was the only manufactured product showing an increase in this period. Gains were noted in the United Kingdom, Canada and the United States, being 33 percent, 29 percent and 12 percent, respectively. These increases reflect the favorable price relationship of evaporated and condensed milk as compared with butter and cheese. In Australia, the only other country for which figures were available, production in this period was 3 percent below the corresponding months of 1947.

Dried milk production declined generally in the July-September quarter of 1948, but to a lesser degree than butter or cheese. Output in Canada in this period was higher by 16 percent. Australian production also was above that of a year ago, the increase there amounting to 7 percent. In the United States, where the output of non-fat solids was approximately 9 percent lower, the production of total dried milk in the third quarter was 5 percent below the corresponding quarter of the earlier year. Figures are not available at this time for other producing countries.

Current Conditions Abroad:

Sydney:- With good rains in many dairy areas in late September or early October improving pasture and crop growth and more cows coming into production, milk output in Australia should continue on a favorable level.

Wellington:- The 1948-49 production year in New Zealand has gotten off to a record start. If average climatic conditions prevail throughout the year, butter and cheese production should be somewhat higher than last year.

London:- Milk production has been increasing in the United Kingdom as the result of more favorable pasture and feed conditions and slightly increased cow numbers. It is expected that the feed situation will improve further in the coming year, and milk yields will be high with a record output anticipated.

The Hague:- The dairy production outlook in the Netherlands continues to be favorable. The number of cows is gradually increasing, pasture conditions are excellent and the supply of concentrates is improving, due to the availability of ensiled grass.

Copenhagen:- In Denmark, both weather conditions and pastures improved markedly in the third quarter. The outturn of fodder roots has been excellent, and with abundant winter roughage supplies assured, dairy production prospects in the fourth quarter are favorable.

Buenos Aires:- The seasonal rise in milk production has been slow in developing due to drought conditions in the northern provinces and shortage of rainfall and late spring frosts in the Province of Buenos Aires.

Prepared by Regina M. Murray and Floyd E. Davis, based largely on reports from Foreign Service Officers.

UNITED KINGDOM CONTRACTS FOR CANADIAN BACON, CHEESE, AND EGGS

The Governments of Canada and the United Kingdom announced on December 8 an agreement whereby the British in 1949 are to purchase 160 million pounds of bacon and 50 million pounds of cheese, subject to ECA approval. The prices agreed to were $36 per hundred pounds for top-quality bacon and 30 cents per pound, f.o.b. factory, for cheese. These prices are the same as for the 1948 contract when 195 million pounds of bacon and 50 million pounds of cheese were stipulated.

For eggs, the new agreement provides for 46 million dozens of shell eggs or the equivalent in the form of dried whole or frozen whole eggs for the 11 months' period Febeuary 1 to December 31.

Shipments in 1949 will be 19.5 million dozen storage eggs, 3,000 tons of dried eggs and 4,000 tons of frozen eggs.

While the new contract volume is below that of 1948, it is considered that with some opening of other export markets in 1949 the quantity should be reasonably adequate to absorb the probable producion in that year.

The 1949 prices will be 52½ cents per dozen for storage eggs; $1.36 per pound for dried eggs and 32½ cents per pound for frozen eggs. 1948 prices have been 54¼ cents per dozen for storage eggs, $1.46 per pound for dried eggs and 35 cents per pound for frozen eggs. While the 1949 prices were slightly below those of 1948 it is expected that a major portion of the reduction can be met through economies in operating and processing costs and that the necessary reduction in egg prices paid to producers will be relatively small. Such reduction should be compensated for to a considerable extent by the partial removal of restrictions on exports to other markets, according to Canadian officials,

URUGUAY AND THE UNITED KINGDOM FINALIZE MEAT CONTRACT

The British and Uruguayan Governments formally signed, on December 2, 1948, the Eight Meat Contract covering the period February 18, 1948 through February 17, 1949. The contract provides for deliveries of 34,000 long tons of beef and mutton. The prices to be paid under the contracts are equivalent to those which the United Kingdom is now paying to Argentina. In addition to the agreed prices, the British are also to give a lump sum payment of 555,362 pounds sterling (equivalent to $2,238,109.)

The 34,000 long tons of meat covered by the contract have been specified as follows: Frozen beef, 21,000; frozen lamb and mutton, 5,500; edible offal, 2,500; and, canned beef and canned mutton, 5,000.

Meat exports from Uruguay for the first 9 months of 1948 totalled 51,355 metric tons compared with 27,071 tons for the same period of 1947. Nearly two-thirds of the 1948 exports have been frozen beef compared with less than one-fourth in 1947. In the 9 months ending with September, 1948, 30 percent of the frozen beef exports were to the United Kingdom, 34 percent of the frozen mutton, and 24 percent of the canned beef. The United States was the principal destination of canned beef, taking about 15 million pounds or 52 percent of such exports. (Further details on the new Uruguayan-United Kingdom contract are available in the Office of Foreign Agricultural Relations.)

DANISH HOG NUMBERS CONTINUE UPSWING

The number of bred sows in Denmark on October 25, 1948 showed an increase of 55 percent over the preceding year, thus continuing the upward trend in breeding which began earlier in 1948.

Danish hog numbers, by classes, on October 25, 1948, were as follows, with comparable figures for October 11, 1947 in parentheses: Bred sows, 165,000 (91,000); total sows, 234,000 (181,000); suckling pigs, 362,000 (438,000); pigs and slaughter hogs, 1,298,000 (1,358,000); total, including boars, 1,903,000 (1985,000). (See Foreign Crops and Markets, November 1, 1948, page 345 for other comparisons.)

NETHERLANDS CATTLE AND HOG NUMBERS REGAIN 1947 LOSSES

Cattle and hog numbers in the Netherlands in September, 1948, were back at about September 1946 levels, having about regained losses suffered in 1947, due to drought and short import supplies of feed. Present numbers are, however, still appreciably below those of September 1939. The following official statistics give comparisons by classes:

Netherlands: Number of cattle and hogs by classes reported for September, 1939 and annually 1945-48

Cattle:	Sept. 1939 Thousands	Sept. 1945 Thousands	Sept. 1946 Thousands	Sept. 1947 Thousands	Sept. 1948 Thousands
Calves, under 1 yr.					
Heifers	493	483	461	420	417
Male		40	28	22	25
Calves, 1-2 years old					
Bred	531	188	179	152	163
Not bred		224	230	203	195
Young cattle over 2 yrs.					
Bred		56	65	63	77
Not bred		21	29	26	34
Milk cows and cows in calf					
1st calf	--	--	313	325	295
2nd "	--	--	229	249	280
3d "	--	--	251	246	279
Other	--	--	475	471	473
Total	1,563	1,177	1,268	1,290	1,326
Steers, 1 year and older	29	25	23	21	21
Fat cattle and cattle for fattening	94	13	25	34	42
TOTAL CATTLE	2,733	2,226	2,309	2,232	2,299

Hogs:	1/				
Pigs					
Under 6 wks.	342	208	257	182	206
Over 6 wks. under 25 kg. 2/	608	352	455	124	118
25-40 kg.				147	124
40-60 kg.				188	173
60-95 kg.	296	178	191	176	207
95-150 kg.	213	35	58	63	93
Over 150 kg.		2	7	7	15
Sows		12	30	21	14
Fattening		12	30	21	14
Bred, not showing:	152				
Gilts		21	17	10	13
Other			16	17	26
Bred, showing:					
Gilts		30	12	8	11
Other			15	15	23
Suckling pigs		27	37	27	23
Other breeding					
Gilts		61	52	42	80
Other		21	18	14	9
Boars	5	3	4	2	2
TOTAL HOGS	1,616	950	1,168	1,043	1,137

1/ For 1939 hog numbers are for August. 2/ One kilogram equals 2.2046 pounds.
Compiled in Office of Foreign Agricultural Relations from official sources.

GRAINS, GRAIN PRODUCTS AND FEEDS

FROSTS AND DROUGHT DAMAGE ARGENTINE GRAIN CROPS

Prospects for all Argentine grain crops, especially small grains, have taken an unfavorable turn as a result of recent frosts and drought, according to the Agricultural Attache, American Embassy, Buenos Aires.

Personal observation over the past week end confirmed earlier reports of severe damage to small grain crops in the west central zone as a result of the hard frost on November 11 and 12. Many fields in that area were abandoned. A recurrence of frost in central and south Buenos Aires Province on November 26 caused further damage.

Because stands were in various stages of development, ranging from virtual maturity in middle Santa Fe and east central Cordoba, to initial heading stage in South Buenos Aires and the southeast La Pampa Territory, the actual damage varied in intensity from one area to another. General lack of rainfall after the freeze intensified the damage, especially in southwest Buenos Aires Province and the La Pampa Territory, where small grain crops had been suffering for about 10 days from abnormally high temperatures and deficient moisture.

While no official estimate of the damage has been issued as yet, the total Argentine small grain harvest is certain to be substantially smaller than in 1947-48. Last season's production was as follows: Wheat 250 million bushels, oats 45 million and barley 40 million. The estimate of 1948 wheat production in Foreign Crops and Markets, November 29, 1948, placed the crop at 180 million bushels. Latest reports on damage indicate a reduction of 10 percent or more from that figure. Farmers in many affected areas were expected to begin replanting grain stubble to sunflowers if sufficient rain fell before late December.

While foliage in considerable proportions of corn stands was noticeably frozen in northern Buenos Aires and southern Santa Fe Provinces, the effect on eventual total outturn probably will be within 5 to 10 percent. Arrival of hot weather without adequate rainfall after the frost slowed up development of the corn crop in some areas and this may cause late tasseling at an unfavorable time. Last year's corn crop amounted to 265 million bushels.

SLIGHT INCREASE IN ARGENTINE WHEAT EXPORTS

Argentine wheat exports during the marketing season just ended in this Southern Hemisphere country were slightly higher than a year ago, but still 31 percent below the prewar average, according to latest unofficial reports. Exports during the season amounted to 2,191,000 metric tons (80,487,000 bushels), compared with 2,179,000 metric tons (80,487,000 bushels), in 1946-47, and the annual average of 3,172,000 metric tons (116,566,000 bushels) for the 5-year period 1934-35 to 1938-39.

The Argentine wheat crop and marketing season extends from December 1, when harvesting usually begins, until November 30 of the next year.

Wheat from Argentina was shipped to relatively few countries in 1947-48. The accompanying table, giving exports by country of destination, shows that 2 countries, Italy and Spain, took 1,113,000 metric tons (40,883,000 bushels), or 51 percent of the total. Italy, Spain, Brazil, Switzerland and India, together, took 1,712,000 metric tons (62,889,000 bushels), or more than three-fourths of the total.

Monthly shipments of wheat from Argentina during the first 4 months of 1948 were higher than those for the corresponding months of the 2 previous years, but (except for April) were still below the prewar average. (See table.) However, with greatly improved crops in European countries and with the availability of new crop wheat from North America, a rather sharp decline subsequently occurred in the monthly shipments. Since May 1948, monthly exports have been averaging 52 percent below those for the corresponding months of 1947.

The all-time record exports of wheat from Argentina occurred in the calendar year 1929, when 6,613,000 metric tons (242,996,000 bushels) were shipped. The lowest exports during the 20-year period 1920-39 were 1,610,000 metric tons (59,171,000 bushels) in 1936. The annual average export movement of Argentine wheat in that period was 3,692,000 metric tons (135,663,000 bushels.)

These data do not include shipments of flour which normally average about 100,000 metric tons per year. In the calendar year 1946, Argentine wheat exports declined to 1,387,000 metric tons (50,976,000 bushels), the lowest in almost 30 years. With the exception of the 1947 crop, production of wheat in Argentina has been well below average during the postwar period.

(Tables on following pages)

Argentina: Monthly wheat exports, by country of destination, year beginning December 1947 1/
(In metric tons of 2204.6 pounds each)

Destination	December	January	February	March	April	May	June	July	August	September	October	November	Total
Belgium	-	38,000	40,361	6,697	-	-	-	-	-	-	-	-	85,058
Czechoslovakia	-	7,500	-	-	-	-	-	-	-	-	-	-	7,500
Eire	-	-	-	35,859	39,140	-	-	-	-	-	-	-	74,999
Italy	64,755	93,693	118,804	106,176	136,755	81,141	55,720	41,177	-	7,320	-	-	705,541
Portugal	24,642	918	14,855	5,617	21,432	4,668	-	-	-	-	-	-	72,132
Spain	26,721	37,087	32,888	29,339	31,389	65,616	59,832	23,799	26,442	27,243	8,509	38,250	407,115
Sweden	22,894	4,153	-	-	41	-	-	-	-	-	-	-	27,090
Switzerland	-	13,207	36,485	71,769	53,513	5,509	-	-	-	-	-	-	180,483
United Kingdom	41,237	41,622	-	5,315	-	-	-	-	-	-	-	-	88,174
Brazil	10,530	46,107	35,061	3,112	64,652	29,394	13,989	-	52,559	32,289	11,939	-	299,632
Colombia	-	-	-	5,000	10,058	-	-	-	-	-	-	-	15,058
Paraguay	1,962	-	-	2,800	1,800	2,708	-	-	-	-	650	-	9,920
Peru	-	17,644	4,369	10,080	25,632	22,961	-	2,453	9,100	2,000	2,500	-	96,739
Uruguay	2,268	-	-	-	-	-	-	-	-	-	-	-	2,268
India	908	-	-	-	-	-	-	-	-	-	64,071	53,833	118,802
Total	195,917	299,933	282,823	281,764	384,412	211,997	129,541	67,429	88,101	68,852	87,669	92,073	2,190,511

1/ Unofficial trade data. Shipments for November cover period from November 5 to December 2, 1948, inclusive.

Argentina: Wheat exports, by months,
Average 1934-35 to 1938-39, annual 1945-46 to 1948-49 1/
(1,000 metric tons of 2204.6 pounds each)

Month	Average 1934-35 to 1938-39	1945-46	1946-47	1947-48	1948-49
July	217	262	201	236	67
August	224	240	116	188	88
September	200	185	87	193	69
October	181	170	54	205	88
November	157	50	34	196	92
December	201	97	59	163	
July-December	1,180	1,004	551	1,181	
January	376	58	102	315	
February	393	104	138	288	
March	400	145	130	295	
April	314	160	209	338	
May	266	188	271	233	
June	281	177	252	130	
January-June	2,030	832	1,102	1,599	
July-June	3,210	1,836	1,653	2,780	

1/ Official data prior to and including May 1948, unofficial trade statistics for period June 1948 to date.

SIAM HARVESTS NEAR-RECORD RICE CROP

The 1948 rice harvest of Siam is forecast at 250 million bushels, a near-record production, according to authorities in that country. Beneficial rains were reported ideal for the growth of a bumper crop. The current harvest is expected to be somewhat larger than in the preceding year, when the season was also favorable for rice production.

Exportable supplies from the crop for shipment in 1949 are estimated in that country at 2,750 million pounds, compared with a tentative forecast of 1,700 million pounds shipped in 1948, and with average (1936-40) prewar exports of around 3,100 million pounds. Deliveries in 1948 have been the largest since the war. January-November shipments equaled about 1,600 million pounds, compared with exports in the calendar year 1947 of 850 million pounds.

ECUADOR SUSPENDS RICE EXPORTS

The suspension of rice exports from Ecuador was announced in mid-November by the Ministry of Economy. According to the official release, rice supplies, including those not yet harvested from the December crop, are estimated at 90 million pounds, of which export commitments had been made for more than 40 million pounds. Since current supplies less commitments left only about 50 million pounds for domestic consumption until next July, suspension of additional shipments was ordered.

Commitments included 35 million pounds allotted to Indonesia by the International Emergency Food Committee. Of the allocation, on November 30 about 20 million pounds had been sold, and negotiations were in progress for the sale of the remaining 15 million pounds.

CUBA BUYS LOW-GRADE RICE

Cuban rice importers during November and early December generally limited purchases to lower-priced grades in accordance with their extended voluntary agreement with the Government. As a result, consumers now are able to buy this staple at 4 to 6 cents per pound less than in October.

Rice imports into Cuba from August to November, according to ships' manifests, totaled 176 million pounds, as follows: August, 3; September, 28; October, 42, and November 103. These receipts were reportedly all of United States origin.

U.S. EXPORTS MORE RICE IN OCTOBER

October exports of United States rice equaled 83 million pounds compared with August and September deliveries of 19 and 41 million pounds, respectively. Consignments during the August-October period of the current marketing year were 30 percent less than in the corresponding period of the year before, when advance shipments to Cuba raised exports considerably above average.

Of October shipments, about 80 percent was delivered to Western Hemisphere destinations, most of which went to Cuba. About 9 million pounds of rough rice was delivered to Canada. Exports to Europe consisted of 2 million pounds to Denmark.

UNITED STATES: Rice exports to specified countries, October 1948, with comparisons a/

Continent or country	August-July		August-October		October	
	1937-38 to 1941-42	1947-48 b/	1947 b/	1948 b/	1947 b/	1948 b/
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Europe	43	22	c/	7	c/	2
Cuba	275	527	178	94	109	60
Canada	19	54	14	7	8	6
British West Indies	c/	11	c/	1	c/	1
Netherlands Indies	d/	1	c/	15	0	13
China	d/	203	0	12	0	0
Korea	d/	54	8	4	0	0
Other countries	21	23	3	3	2	1
Total	358	895	203	143	119	83

a/ Includes milled rice, brown, broken, screenings and rough rice converted to milled at 65 percent. b/ Preliminary. c/ Less than 500,000 pounds. d/ If any, included in other countries.

Compiled by the Office of Foreign Agricultural Relations, from official records, Bureau of the Census.

FATS AND OILS

1948-49 MEDITERRANEAN PRODUCTION OF EDIBLE OLIVE OIL ONLY HALF AS LARGE AS LAST YEAR'S

Estimated production of edible olive oil from the 1948-49 crop has fallen below the high 1947-48 production by 55 percent. Estimates for all countries total 582,100 short tons this season as compared with 1,283,200 last season. The 1946-47 production, 812,000 short tons, was close to average, but the production of 1945-46, 538,900 short tons, was below average.

In the Mediterranean countries all of the important European producers, Spain, Italy, Greece, Portugal and France reported a heavy reduction from last year. Production in these countries, estimated at 1,126,300 short tons for 1947-48, declined to only 450,400 short tons for 1948-49 or 60.0 percent drop. Only Tunisia, of all the countries in the Mediterranean area, has estimated a large increase in the 1948-49 production over the 1947-48 output, that is 20,000 short tons in 1947-48 and 55,000 short tons in 1948-49, an increase of 175 percent.

Total exports of edible olive oil from the Mediterranean Basin to all countries, based on export statistics received from the respective countries, was approximately 14,000 short tons for the year 1947 and over 30,000 short tons for the first 8 months of 1948. The increase in exports resulted from the very large 1947-48 production of olive oil, satisfaction of the domestic demand for edible olive oil, and the demand for edible olive oil in the dollar exchange countries.

Imports of edible olive oil from the Mediterranean countries into the United States in the first 9 months of 1948 were more than double the 1946 or 1947 total imports. Imports for the 9 months of 1948 totaled 13,152 short tons compared with 5,625 short tons and 6,330 short tons for the 12 months, 1947 and 1946, respectively.

Prices have increased considerably in all the producing countries and where the prices are under government control, black markets have usually become active. Prices at the end of 1947 were uniform and relatively stable. As the very large 1947-48 production became available, both domestic and export prices tended to drop considerably as competition was felt both as to quantity available and quality. The presence of the large 1947-48 production eased the domestic oil situation considerably and left a considerable exportable surplus. This production also had the effect of easing government export regulations and other government restrictions such as rationing and commercialization. However, when it became apparent that the 1948-49 production would be short, prices began to climb steadily until they now have surpassed the 1947 prices.

In nearly all countries there is a sufficient edible olive oil carry-over, either in private or government stocks, to compensate for the short 1948-49 production, and domestic requirements can be met in 1949. The high price of good quality edible olive oil on the export market, particularly in the dollar areas, should ensure some exports. If necessary, cheaper oils may be imported for domestic consumption in lieu of olive oil. More of the poorer quality olive oils will be refined and less used for soaps. Tunisia should have a considerable exportable surplus available for those mediterranean countries which are deficit in domestic requirements or for export to other areas.

EDIBLE OLIVE OIL: Estimated Mediterranean Basin Production
Average 1940-41/1944-45 and Annual
(Rounded to nearest 100 short tons)

Country	Average	Annual			
	1940-41/1944-45	1945-1946	1946-1947	1947-1948	1948-1949
	Short tons	Short tons	Short tons	Short tons	Short tons
Europe:					
France	6,700	5,500	4,400	5,500	4,400
Greece	91,900	107,000	91,300	159,800	60,000
Italy	210,400	110,000	165,000	284,000	141,000
Portugal	62,600	43,800	49,500	98,000	25,000
Spain	342,800	176,000	385,000	579,000	220,000
Others	2,900	2,000	5,300	4,000	1/ 2,500
Middle East:					
Palestine	7,600	11,700	1,600	3,300	1/ 3,000
Syria.	12,800	16,000	8,800	14,000	10,000
Lebanon		7,500	1,300	14,000	12,000
Turkey	31,500	35,200	35,200	66,000	27,500
Africa:					
Algeria	17,200	8,800	22,000	14,600	14,000
French Morocco . . .	12,200	5,500	19,800	20,000	6,000
Tunisia	44,100	7,700	22,000	20,000	55,000
Libya.	2,500	2,200	800	1,000	1,700
Total	845,200	538,900	812,000	1,283,200	582,100

1/ Estimated.

Compiled from official sources and consular reports.

EDIBLE OLIVE OIL: Total imports into the United States
from the Mediterranean Basin countries
Averages 1942-46, 1937-46 and annual 1945-1948

Country	Average	Average	Annual a/			
	1942-46	1937-46	1945	1946	1947	1948 b/
	Short ton	Short ton	Short ton	Short ton	Short ton	Short ton
France	8	999	0	0	6	15
Greece	843	2,953	0	16	271	810
Italy	394	5,826	0	1,842	1,884	5,741
Spain	1,822	2,457	4,519	3,803	2,020	2,763
French Morocco . . .	c/	c/	1	0	1,021	3,751
Others	160	1,500	3	669	423	72
Total	3,227	13,735	4,523	6,330	5,625	13,152

a/ Calendar year. b/ Nine months, January through September 1948.
c/ Included in "other" countries.

Compiled from official records of the Bureau of Census.

U. S. EXPORTS OF SPECIFIED
FATS, OILS, AND OILSEEDS

The following table shows United States exports of specified fats, oils, and oilseeds during January-October 1948 with comparisons:

UNITED STATES: Exports of specified fats, oils, and oilseeds,
January-October 1948 with comparisons

Commodity	Unit	Average 1935-39	1946	1947 a/	January-October	
					1947 a/	1948 a/
Soybeans	1,000 bu.	b/ 4,793	2,906	2,505	1,884	2,329
Soybean oil:						
Refined	" lbs.	c/ 6,647	72,583	38,883	28,469	34,294
Crude			13,228	68,395	43,578	39,983
Coconut oil:						
Refined	" "	3,789	935	5,491	3,381	8,773
Crude	" "	10,442	47,366	52,427	48,324	9,507
Cottonseed oil:						
Refined	" "	4,793	5,857	10,977	4,101	20,606
Crude	" "	1,515	244	901	84	3,841
Flaxseed	1,000 bu.	c/	20	16	12	126
Linseed oil	1,000 lbs.	1,280	1,625	9,792	5,026	25,667
Peanuts:	" "					
Shelled	" "	452	61,043	212,253	133,798	291,057
Not shelled	" "		7,066	18,681	14,632	7,145
Peanut oil, refined	" "	d/ 325	75	1,579	695	669
Cooking fats	" "	2,111	11,424	3,594	2,948	2,745
Lard	" "	165,636	430,682	380,735	324,926	215,605
Oleomargarine	" "	180	50,483	19,954	16,461	3,124
Tallow:						
Edible	" "	1,651	4,151	601	564	1,277
Inedible			6,472	54,553	44,991	49,837

a/ Preliminary. b/ Average of less than 5 years.
c/ Not separately classified in Foreign Commerce and Navigation.
d/ 1939 only.
Compiled from official sources.

U. S. IMPORTS OF SPECIFIED VEGETABLE OILS AND OILSEEDS

The following table shows United States imports of specified vegetable oils and oilseeds during January-September 1948 with comparisons:

UNITED STATES: Imports a/ of specified oils and oilseeds, January-October 1948 with comparisons.

Commodity	Unit	Average 1935-39	1946	1947 b/	January-October 1947 b/	January-October 1948 b/
Babassu kernels	1,000 lbs.	c/	39,463	22,233	22,013	43,390
Babassu oil	" "	d/ 346	2,314	1,747	1,523	1,224
Castor-beans	" "	132,924	226,295	276,807	209,055	245,315
Castor oil	" "	226	6,450	6,595	6,595	1,939
Flaxseed	" bu.	18,470	3,394	282	280	1,049
Linseed oil	" lbs.	713	94,405	117,326	117,325	3,604
Copra	Short tons	230,000	394,696	677,660	524,610	369,825
Coconut oil	1000 lbs.	342,717	2,353	23,559	17,523	69,691
Oiticica oil	" "	d/ 7,673	22,593	8,471	8,071	15,773
Olive oil:						
Edible	" "	62,811	12,660	11,250	9,345	29,973
Inedible	" "	35,448	103	248	227	7,730
Palm oil	" "	321,482	37,850	63,212	50,250	47,804
Sesame seed	" "	58,425	4,891	9,479	9,110	21,481
Tea seed oil	" "	13,159	88	6,377	6,130	3,437
Tucum kernels	" "	e/ 9,810	12,709	16,887	16,887	12,487
Tung oil	" "	123,190	36,207	121,564	91,749	110,621

a/ Imports for consumption. b/ Preliminary. c/ Not separately classified in Foreign Commerce and Navigation. d/ Average of less than 5 years.
e/ 1939 only.
Compiled from official sources.

PHILIPPINE COPRA EXPORTS LARGEST SINCE FEBRUARY 1/

Philippine copra exports of 58,746 long tons during November were the largest monthly shipment since February. The total for the first 11 months of 1948 amounted to 575,872 tons, representing 64 percent of the volume which moved out during January-November 1947. The United States received only 31,653 tons in November compared with 78,857 for November 1947. Bi-Zonal Germany received 11,600 tons, Japan 6,000, Italy 3,350, France 3,100, and Syria, 1,400.

Copra production has not recovered as rapidly as was expected from last year's typhoon destruction. Recovery of trees in the Bicol and Samar regions has progressed slowly. Full production may not be reached until mid-year of 1949. Production in the Visayan Islands, Mindanao, has been relatively steady but is apparently below the rate of output for the corresponding period of last year. In the Queson-Laguna region of southern Luzon, most of the trees have recovered. It is in this region, however, that the effects of the dissident Hukbalahap groups are being felt (See Foreign Crops and Markets, November 22, 1948). It is believed that the total Philippine output of copra for 1948 will be slightly less than 800,000 tons. Thus far no destructive typhoons have damaged the coconut groves, but there is always the possibility of such damage in December.

Coconut-oil exports dropped to 3,431 tons in November following the monthly peak of 8,633 in October. Over 2,500 tons were sent to the Atlantic Coast of the United States, 674 to the Gulf Coast, and 250 to Trieste. During September a new crushing plant began operations in Manila. When copra supplies become more abundant and prices stabilized, it is expected that this new plant, which has the largest crushing capacity in the Philippines, will furnish significant quantities of coconut oil for export.

Local buying prices continued into early December at 49 to 50 pesos per 100 kilograms ($249 to $254 per long ton) in Manila and 45 to 50 pesos ($229 to $254 per long ton) in producing regions. Likewise European buyers were still offering $240 per long ton f.o.b.

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

PHILIPPINE ISLANDS: Copra exports, November 1948 with comparisons
(Long tons)

Country a/	Copra distribution				
	Average 1935-39	1947 b/	Jan.-Oct. 1948 b/	November 1947 b/	November 1948 b/
United States (total)	206,801	585,620	307,500	78,857	31,653
Atlantic Coast	-	116,034	45,823	29,852	13,879
Gulf Coast	-	77,155	51,144	-	5,874
Pacific Coast	-	392,431	210,533	49,005	11,900
Canada	-	16,607	15,049	-	-
Costa Rica	-	-	-	-	100
Mexico	7,260	1,500	-	-	-
Panama Canal Zone	-	1,009	2,064	-	-
Columbia	-	5,300	3,828	-	-
Venezuela	-	7,862	2,525	-	-
Austria	-	6,000	6,000	-	-
Belgium	10	10,306	1,000	-	-
Czechoslovakia	-	7,676	-	-	-
Denmark	6,025	44,823	22,536	1,000	-
France	24,589	73,232	60,812	2,700	3,100
Bi-Zonal Germany	7,309	11,220	5,350	-	11,600
Italy	4,079	26,076	15,400	850	3,350
Netherlands	28,415	7,962	7,949	800	-
Norway	91	15,719	8,276	-	-
Poland	-	21,762	28,750	5,100	-
Sweden	4,183	11,898	4,748	2,032	-
Switzerland	-	12,379	1,000	-	-
United Kingdom	80	24,250	-	-	-
Yugoslavia	-	13,283	-	-	-
India	-	13,200	-	-	
Japan	1,047	16,100	18,339	-	6,000
Palestine	-	7,510	-	-	-
Syria	-	-	-	-	1,443
Egypt	1,271	3,560	-	3,560	-
French Morocco	-	6,050	-	-	-
Union of South Africa	-	16,579	-	-	-
Others	8,678	949	6,000	-	1,500
Total	299,838	968,432	517,126	94,899	58,746

a/ Declared destination. b/ Preliminary.
American Embassy, Manila.

NETHERLANDS INDIES NOVEMBER COPRA EXPORTS SHOW INCREASE

November copra exports of 25,451 long tons from the Netherlands Indies represent a substantial increase over the comparatively small quantity shipped in October (14,753). The Netherlands received 12,834 tons, Bi-zonal Germany 7,608, Belgium 3,001, and Switzerland and the Union of South Africa each 1,004. January-November exports now total 221,788 tons or 48 percent more than the entire quantity shipped in 1947. December exports are forecast at 17,300 tons.

November production is placed at 32,252 tons compared with 33,300 in October. Deliveries to crushers amounted to 5,275 tons and month-end stocks to 39,053. Prices remained unchanged.

NETHERLANDS INDIES: Copra exports, November 1948 with comparisons
(Long tons)

Country	Copra distribution				
	Average 1935-39	1947 a/	Jan.-Oct. 1948 a/	November 1947 a/	November 1948 a/
Canada	-	-	7,216	-	
Mexico	12,614	-	-	-	
United States	3,909	1,546	5,743	-	
Belgium	8,053	-	5,049	-	3,001
Czechoslovakia	4,896	5,000	2,000	-	
Denmark	72,375	7,999	4,134	-	
France	12,748	4,000	5,907	-	
Bi-Zonal Germany	64,674	-	9,972	-	7,608
Italy	23,103	-	-	-	
Netherlands	133,841	114,157	142,376	-	12,834
Norway	31,810	5,469	1,000	3,469	
Poland	1,422	-	2,460	-	
Sweden	6,886	3,200	5,984	-	
Switzerland	17	2,082	4,496	-	1,004
Singapore	107,285	-	-	-	
Union of South Africa	-	5,249	-	-	1,004
Others	23,752	1,525	-	-	
Total	507,385	b/150,227	b/196,337	b/3,469	b/25,451

a/ Preliminary. b/ Does not include unrecorded shipments to Singapore.
Copra Board, Batavia.

COTTON AND OTHER FIBER

COTTON-PRICE QUOTATIONS
ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets, converted at current rates of exchange:

COTTON: Spot prices in certain foreign markets, and the U.S. gulf-port average

Market location, kind, and quality	Date 1948	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria		Kantar			
Ashmouni, Good............	12-16	99.05 lbs.	Tallari	57.45	47.94
Ashmouni, F.G.F............	"	"	"	54.95	45.85
Karnak, Good..............	"	"	"	95.60	79.77
Karnak, F.G.F..............	"	"	"	91.10	76.01
Bombay		Candy			
Jarila, Fine..............	"	784 lbs.	Rupee	617.00	23.74
Broach, Fine..............	"	"	"	a/ 650.00	25.01
Kampala, East African.....	"	"	"	(not	available)
Karachi		Maund			
4F Punjab, S.G., Fine.....	12-15	82.28 lbs.	"	75.80	27.79
289F Sind, S.G., Fine.....	"	"	"	88.80	32.56
289F Punjab, S.G. Fine...	"	"	"	95.80	35.12
Buenos Aires		Metric ton			
Type B....................	12-16	2204.6 lbs.	Peso	a/ 3350.00	45.24
Lima		Sp. quintal			
Tanguis, Type 5...........	12-14	101.4 lbs.	Sol	182.00	27.67
Pima, Type 1..............	"	"	"	(not	quoted)
Recife		Arroba			
Mata, Type 4..............	12-16	33.07 lbs.	Cruzeiro	185.00	30.44
Sertao, Type 5............	"	"	"	190.00	31.26
Sao Paulo					
Sao Paulo, Type 5.........	"	"	"	204.00	33.56
Torreon		Sp. quintal			
Middling, 15/16"..........	"	101.4 lbs.	Peso	181.50	26.00
Houston-Galveston-New Orleans av. Mid. 15/16"...	"	Pound	Cent	XXXXX	31.78

Quotations of foreign markets reported by cable. U.S. quotations from designated spot markets.

a/ Nominal.

WORLD FLAXSEED--(Continued from Page 484)

While definite plans for 1949 have not been announced, indications are that an additional 10,000 acres will be planted to flaxseed.

Both Australia and New Zealand are desirous of increasing flaxseed production. In the latter country acreage rose from 10,400 acres in 1945 to 21,400 in 1947 but dropped to 13,000 in 1948. This decline is probably the result of poor yields last year, when the crop received a severe setback by an attack from rust and by lack of moisture. In addition to the flax grown for oilseed about 25,000 bushels from fiber flax may be available for crushing during the 1948-49 season.

This is one of a series of regularly scheduled reports on world agricultural production prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, R. S. Kifer, Regina H. Boyle, Helen Francis, Lois B. Bacon, and S. E. Bakewell.